

## **Lionel Henderson & Co., Inc.**

**GENERAL SERVICES ADMINISTRATION  
FEDERAL SUPPLY SERVICE  
AUTHORIZED FEDERAL SUPPLY SCHEDULE PRICELIST**

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage!™, a menu-driven database system. The INTERNET address for GSA Advantage!™ is: <http://www.fss.gsa.gov>.

Temporary Administrative and Professional Staffing Services (TAPS)  
Federal Supply Class: 736

Contract Number: **GS-07F-0669X**

For more information on ordering from Federal Supply Schedules  
click on the FSS Schedules button at <http://www.fss.gsa.gov>

Contract Period: August 1, 2011 – July 31, 2021

Contractor: Lionel Henderson & Co., Inc.  
6525 Belcrest Road - Suite 610  
Hyattsville, MD 20782-2027  
916-429-8601 (p)  
916-429-6430 (f)  
[www.lionelhenderson.com](http://www.lionelhenderson.com)

Business Size: Small Business

Contract Administrator: Jeff Withrow

### **CUSTOMER INFORMATION:**

1a. Awarded Special Item Number(s):

Special Item Number (SIN)	Description	Pricing
736-1	Administrative Support and Clerical Operations	See Page 5
736-1RC	Administrative Support and Clerical Operations – Recovery Purchasing	See Page 5

1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract: Not Applicable.

1c. Descriptions of all corresponding commercial job titles with experience, functional responsibility and education are provided beginning on page 6.

2. Maximum Order: \$100,000

\*If the "best value" selection places your order over the Maximum Order, identified in this catalog/price list, you have an opportunity to obtain a better schedule contract price. Before placing your order, contact the aforementioned contractor for a better price. The contractor may (1) offer a new price for this requirement (2) offer the lowest price available under this contract or (3) decline the order. A delivery order that exceeds the maximum order may be placed under the Schedule contract in accordance with FAR 8.404.

3. Minimum Order: \$100

4. Geographic Coverage: Any location listed in the SCA Wage Index Matrix.

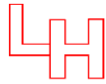
The preponderance of work location has been identified as:

District of Columbia, Maryland, Virginia, District of Columbia, Statewide, Maryland Counties of Calvert, Charles, Frederick, Montgomery, Prince George's and St Mary's, Virginia Counties of Alexandria, Arlington, Fairfax, Falls Church, Fauquier, King George, Loudoun, Prince William and Stafford, Wage Determination No. 2005-2103, Revision 11 dated 06/13/2011.

Lionel Henderson & Co., Inc. may perform work at any of the locations listed in the SCA Wage Index Matrix. Service in an area with lower SCA rates than the stated preponderance of work location, resulting in lower wages being paid, will have the prices for that Task Order discounted accordingly.

5. Point of Production: Lionel Henderson & Co., Inc.  
4827 Laguna Park Drive, Suite 3  
Elk Grove, California 95728
6. Prices Shown Herein are Net (discount deducted)
7. Quantity Discount: None
8. Prompt Payment Terms: Net 30 days
9. Government Purchase Cards are accepted below and above the micro-purchase threshold.
10. Foreign Items: None
- 11a. Time of Delivery: Lionel Henderson & Co., Inc. shall deliver or perform services in accordance with the terms negotiated in an agency's order. Lionel Henderson & Co., Inc. will not propose in excess of its standard commercial delivery or performance times to agencies without giving notice to the Ordering Officer of its intent to do so.
- 11b. Expedited Delivery: Consult with Contractor
- 11c. Overnight/2-Day Delivery: Consult with Contractor
- 11d. Urgent Requirements: Consult with Contractor
12. FOB Point: FOB Destination
13. Ordering Address: Lionel Henderson & Co., Inc.  
6525 Belcrest Road - Suite 610  
Hyattsville, MD 20782-2027
14. Payment Address: Lionel Henderson & Co., Inc.  
6525 Belcrest Road - Suite 610  
Hyattsville, MD 20782-2027
15. Warranty Provisions: Standard Warranty

16. Export Packing charges: Not applicable
17. Terms and conditions of Government Purchase Card Acceptance: Contact Lionel Henderson & Co., Inc. for terms and conditions of Government Purchase Card acceptance.
18. Terms and conditions of rental, maintenance, and repair: Not applicable
19. Terms and conditions of installation: Lionel Henderson & Co., Inc. shall deliver or perform services in accordance with the terms negotiated in an agency's order.
20. Terms and conditions of repair parts: Not applicable
21. List of service and distribution points: Not applicable
22. List of participating dealers: Not applicable
23. Preventive maintenance: Not applicable
- 24a. Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants: Not applicable
- 24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contractor's website or other location.) The EIT standards can be found at: [www.lionelhenderson.com](http://www.lionelhenderson.com)
25. DUNS Number: 175354471
26. Lionel Henderson & Co., Inc. is registered in the System for Award Management (SAM) database.
27. Uncompensated Overtime is not used.



## **Lionel Henderson & Co., Inc.**

### **CONTRACTOR INFORMATION**

**Lionel Henderson & Co., Inc. (LH)** is a diversified professional services firm that specializes in providing administrative and business management services to its customers. The firm was established in January 1986 by Mr. Lionel G. Henderson, who has more than 30 years of professional experience in accounting, operational management, and business consulting. The firm is certified as a small business by the State of California, and is a recent graduate of the Small Business Administration's 8(a) Program.

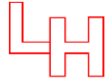
LH primary focus is providing customers with services in administrative support, information management and professional staffing support. LH has over twenty-three years of experience working with federal, state, and private organizations, with a reputation for delivering the highest quality services available. Currently, we support clients in 18 states and the District of Columbia, with a demonstrated ability to manage support services contracts nationwide and a specific business plan to augment this capability.

LH is skilled in maintaining effective government relations in both contractor and subcontractor capacities. We have implemented proven management and quality control techniques to ensure a responsive and cooperative approach with our government customers at all levels.

LH currently has 200 experienced employees with a reputation for delivering the highest quality services available in 18 states and the District of Columbia servicing 41 locations. With over twenty-three years of experiences working with federal, state, and private organizations, we have performed successfully on more than 500 client engagements, demonstrating an exemplary record of professional performance and on-time delivery within cost.

Our formula for success rests on a solid basis of:

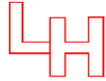
- Highly professional, motivated, experienced, certified, and trained associates with world class experience and capabilities,
- Customer relationships that focus on the delivery of value as measured from the customer's perspective in every project we perform,
- Business relationships that are easy to initiate and maintain, clear, responsive, timely, confidential, cost competitive, and honest, and
- A focus on our core competencies – LH will not commit to any project that we are not capable of performing in a manner that exceeds our customers' expectations. We will maintain our team of professionals exhibiting world-class expertise in our core competencies.



## **Lionel Henderson & Co., Inc.**

**GSA Pricing for  
736-1 - Administrative Support and Clerical Operations  
736-1RC - Administrative Support and Clerical Operations – Recovery Purchasing**

<b>Labor Category</b>	<b>Hourly Rate</b>
Accounting Clerk I	\$24.59
Accounting Clerk II	\$27.11
Accounting Clerk III	\$34.50
Administrative Assistant	\$47.00
Court Reporter	\$33.87
Data Entry Operator I	\$23.63
Data Entry Operator II	\$25.43
Dispatcher, Motor Vehicle	\$28.42
Document Preparation Clerk	\$23.40
Duplicating Machine Operator	\$23.40
General Clerk I	\$24.32
General Clerk II	\$26.19
General Clerk III	\$29.61
Housing Referral Assistant	\$38.61
Messenger Courier	\$22.59
Order Clerk I	\$24.64
Order Clerk II	\$26.54
Personnel Assistant (Employment) I	\$28.81
Personnel Assistant (Employment) II	\$31.79
Personnel Assistant (Employment) III	\$34.98
Production Control Clerk	\$34.14
Receptionist	\$23.70
Rental Clerk	\$26.61
Scheduler, Maintenance	\$28.70
Secretary I	\$28.70
Secretary II	\$31.60
Secretary III	\$38.61
Service Order Dispatcher	\$27.20
Supply Technician	\$43.08
Survey Worker	\$31.39
Travel Clerk I	\$22.14
Travel Clerk II	\$23.61
Travel Clerk III	\$25.16
Word Processor I	\$25.35
Word Processor II	\$28.15
Word Processor III	\$31.27



## **Labor Category Descriptions**

### **01010 ACCOUNTING CLERK (Occupational Base)**

The Accounting Clerk performs one or more accounting tasks such as; posting to registers and ledgers; balancing and reconciling accounts; verifying the internal consistency, completeness, and mathematical accuracy of accounting documents. In addition, tasks include; assigning prescribed accounting distribution codes; examining and verifying the clerical accuracy of various types of reports, lists, calculations, and postings.

This position is responsible for preparing journal vouchers; making entries of adjustments to accounts; and working with spreadsheets. Level I requires a basic knowledge of routine clerical methods, office practices and procedures as they relate to the clerical processing and recording of transactions. Levels II and III require a knowledge and understanding of the established and standardized bookkeeping and accounting procedures and techniques used in an accounting system, or a segment of an accounting system where there are few variations in the types of transactions handled. In addition, most jobs at each level will require a basic knowledge and understanding of the terminology, codes, and processes used in an automated accounting system.

### **01011 ACCOUNTING CLERK I**

This position is responsible for performing one or more routine accounting clerical operations such as: examining, verifying, and correcting various accounting documents to ensure completeness and accuracy of data in accordance to accounting procedures. Specific tasks/duties are assigned under adequate supervision. Entry-level reconciliation and posting will be assigned under detailed guidance. In most instances, an employee in this position will rely on the supervisors' instructions. Completed work will be reviewed for accuracy and compliance with procedures.

### **01012 ACCOUNTING CLERK II**

This position uses knowledge of double entry bookkeeping in performing one or more of the following: posting actions to journals, identifying subsidiary accounts affected, making debit and credit entries, and assigning proper codes. The Accounting Clerk II may review computer printouts against manually maintained journals, detect and correct erroneous postings, and prepare documents to adjust accounting classifications and other data, or review lists of transactions rejected by an automated system. In this instance, the Accounting Clerk II will determine reasons for rejections, and prepare necessary correcting material. On routine assignments, an employee will select and apply established procedures and techniques. Detailed instructions are provided for difficult or unusual assignments. Completed work and methods used, are reviewed for technical accuracy.

### **01013 ACCOUNTING CLERK III**

The Accounting Clerk III maintains journals or subsidiary ledgers of an accounting system and balances and reconciles accounts. Typical duties include one or both of the following: 1.) reviewing invoices and statements verifying information, ensuring sufficient funds have been obligated, and if questionable, resolving with the submitting unit determining accounts involved. The review will include coding transactions, and processing material through data processing for application in the accounting system; 2.) analysis and reconciliation of computer printouts with operating unit reports (contacting units, researching causes of discrepancies, and taking action to ensure that accounts balance). Supervisor provides suggestions for handling unusual or non-recurring transactions. Conformance with requirements and technical soundness of completed work are reviewed by the supervisor, or are controlled by mechanisms built into the accounting processes.

### **01020 ADMINISTRATIVE ASSISTANT**

In addition to secretarial duties (filing, taking phone calls, scheduling appointments, making travel arrangements), this position will provide administrative support to executive staff with office management responsibilities to include budgeting, personnel records and payroll. The Administrative Assistant may be required to work independently on projects requiring research and preparation of briefing charts and other presentation materials.

#### **01040 COURT REPORTER**

This position records examination, testimony, judicial opinions, judge's charge to jury, judgment or sentence of court, or other proceedings in a court of law by manual or machine shorthand. The Court Reporter reads portions of transcript during trial at the judge's request, and asks speakers to clarify inaudible statements. The Court Reporter transcribes recorded material using a typewriter, or dictates material into a recording machine.

#### **01050 DATA ENTRY OPERATOR (Occupational Base)**

This position operates keyboard-controlled data entry devices such as a computer, key-operated magnetic tape, or disc encoder to transcribe data into a format suitable for computer processing. Job task requires skill in operating an alphanumeric keyboard, and an understanding of transcribing procedures and relevant data entry equipment. Positions are classified into levels based on the following definitions:

#### **01151 DATA ENTRY OPERATOR I**

This position works under close supervision and follows specific procedures or detailed instructions. The Data Entry Operator I works from various standardized source documents that have been coded and require little or no selecting, coding or interpreting of data. Problems such as erroneous items and codes, or missing information are resolved at the supervisory level. Work is routine and repetitive.

#### **01152 DATA ENTRY OPERATOR II**

This position requires the application of experience and judgment in selecting procedures to be followed, and searching for interpreting, selecting, or coding items to be entered from a variety of document sources. The Data Entry Operator II may occasionally perform routine work as described for Data Entry Operator I.

***Excluded are operators above Level II using the key entry controls to access, read, and evaluate the substance of specific records to take substantive actions, or to make entices requiring a similar level of knowledge.***

#### **01060 DISPATCHER, MOTOR VEHICLE (Motor Vehicle Utilization Assistant)**

This position is responsible for the assignment of motor vehicles and drivers for conveyance of freight or passengers, and compiles lists of available vehicles. The assignment of vehicles is determined by factors such as length and purpose of trip, freight or passenger requirements, and preference of user. Additional responsibilities include the issuance of keys, record sheets, and driver credentials. The Dispatcher records time of departure, destination, cargo, expected time of return and investigates overdue vehicles. The Dispatcher may confer with customers to expedite or locate missing, misrouted, delayed or damaged merchandise, maintain record of mileage, fuel used, repairs made, and other expenses. The Dispatcher may establish service or delivery routes, supervise loading and unloading, issue equipment to drivers, (such as hand trucks, dollies, and blankets), direct activities of drivers, assign helpers to drivers, work at vehicle distribution centers, and assign vehicles to customer agencies.

#### **01070 DOCUMENT PREPARATION CLERK (Document Preparer)**

This position prepares documents such as brochures, books, periodicals, catalogs, and pamphlets for copying or photocopying. The Document Preparation Clerk cuts documents into individual standardized pages, using a paper cutter or razor knife. Document pages are reproduced as necessary to improve clarity or to adjust the standardized page size according to the limitations of the designated copy machine. The Document Preparation Clerk stamps standard symbols on pages or inserts instruction cards to notify Duplicating Machine Operator of special handling, prepares cover sheets and document folders for material, and index cards for files, and files folder according to index code and copies priority schedule.

**01090 DUPLICATING MACHINE OPERATOR (Photocopy Machine Operator; Reproduction Worker)**

This position operates one or more photocopying, photographic, mimeograph and duplicating office machines to make copies of documents such as letters, reports, directives, manuals, articles and bulletins. Additional responsibilities include: operating small binding machines, performing clerical duties associated with the request for printing and photographic services, preparing assembly sheets, printing requisitions with specifications for printing and binding, recording, delivering and collecting work. The Duplicating Machine Operator performs minor repairs preventive maintenance, and maintains an inventory of supplies and reproduction equipment paying particular attention to important variables indicated by trade name of machine.

**01110 GENERAL CLERK (Occupational Base)**

The General Clerk follows clearly detailed procedures in performing simple repetitive tasks in the same sequence. Responsibilities would include filing pre-coded documents in a chronological file, or operating office equipment, (e.g., mimeograph, photocopy, addressograph or mailing machine).

**01111 GENERAL CLERK I**

This position follows clearly detailed specific procedures in completing several repetitive clerical steps performed in a prescribed or slightly varied sequence, such as coding and filing documents in an extensive alphabetical file; could involve simple posting to individual accounts, opening mail, calculating and posting charges to departmental accounts, operating basic office equipment, e.g., photocopier, facsimile, multi-line phone/voicemail systems, mailing machines, and minimal computer programs. Little or no subject-matter knowledge is required, but the clerk uses his or her own judgment in choosing the proper procedure for each task.

**01112 GENERAL CLERK II**

This position requires familiarity with the terminology of the office unit. The General Clerk selects appropriate methods from a wide variety of procedures or makes simple adaptations and interpretations of a limited number of substantive guides and manuals. The clerical steps often vary in type or sequence, depending on the task. Recognized problems are referred to others.

**01113 GENERAL CLERK III**

This position uses some subject-matter knowledge and judgment to complete assignments consisting of numerous steps varying in nature and sequence. The General Clerk III selects from alternative methods and refers problems not solvable by adapting or interpreting substantive guides, manuals, or procedures. Typical duties include: assisting in a variety of administrative matters; maintaining a wide variety of financial or other records (stored both manually and electronically); verifying statistical reports for accuracy and completeness; compiling information; and handling and adjusting complaints.

The General Clerk III may also direct lower level clerks. Positions above level IV are excluded. Such positions require workers to use a thorough knowledge of an office's work and routine to: 1) choose among widely varying methods and procedures to process complex transactions; and 2) select or devise steps necessary to complete assignments. Typical jobs covered by this exclusion include administrative assistants, clerical supervisors, and office managers.



#### **01120 HOUSING REFERRAL ASSISTANT**

This position provides housing information to an organization's employees moving to a new location. The Housing Referral Assistant will contact individuals or organizations such as landlords, real estate agents, mobile home dealers, trailer court managers and Chambers of Commerce by phone. May correspond to obtain listings of rental or sale properties, future housing prospects, and to develop a working relationship with the housing referral service. Job tasks include: compiling housing lists of rental property and properties for purchase. Periodically the Housing Referral Assistant communicates with contacts to update listings, ensures that property owners comply with the nondiscrimination policy, and counsels applicants with regard to special circumstances, e.g. medical or financial hardships, and availability of housing that will meet applicants' needs.

Job tasks include: providing information regarding community services, searches files, makes telephone calls and referrals, providing information regarding locations, owners, agents, price ranges, loans and other related information. The Housing Referral Assistant maintains daily records of office activities (including number of applicants, number of applicants placed, and agents solicited or listed), schedules appointments for housing inspectors, prepares reports as required, and replies to complaints, investigations and letters of inquiry.

#### **01141 MESSENGER COURIER**

The Messenger Courier delivers messages, documents, packages and mail to various business concerns or governmental agencies. An employee in this role may perform the following: miscellaneous errands, such as carrying mail within the base and sorting or opening incoming and outgoing mail, obtain receipts for articles delivered and keep a log of items received and delivered, or deliver items to offices and departments within an establishment. The Messenger Courier may use a bicycle, golf cart, or motorcycle to perform these duties.

**(Note: Employees who regularly perform driving duties should be classified as a Driver Courier, which is listed under Transportation.)**

#### **01190 ORDER CLERK (Occupational Base)**

The Order Clerk receives written or verbal purchase orders. Work typically involves some combination of the following duties: quoting prices, determining availability of ordered items and suggesting substitutes when necessary, advising expected delivery date and method of delivery, recording order and customer information on order sheets. The Order Clerk is responsible for checking order sheets for accuracy and adequacy of information; ascertaining credit rating of customer; furnishing customer with confirmation of receipt of order; order follow up, or informing customer of a delay in delivery. The Order Clerk maintains order files and verifies shipping invoices against original orders.

This position excludes workers paid on a commission basis or whose duties include any of the following: Receiving orders for services rather than for material or merchandise; providing customers with consultative advice using knowledge gained from engineering or extensive technical training; emphasizing selling skills; handling material or merchandise as an integral part of the job.

#### **01191 ORDER CLERK I**

This position handles orders involving items that have readily identified uses and applications. The Order Clerk I may refer to a catalog, manufacturer's manual or similar document to insure that the proper item is supplied or to verify the price of order.

#### **01192 ORDER CLERK II**

This position handles orders that involve making judgments such as choosing which specific product or material from the establishment's product lines will satisfy the customer's needs, or determining the price to be quoted when pricing involves more than merely referring to a price list or making some simple mathematical calculations.

#### **01260 PERSONNEL ASSISTANT (Occupational Base)**

This position performs a variety of general personnel clerical tasks in such areas as employee records, benefits, education, training, employment/staffing, compensation, employee labor relations, and equal employment opportunity/affirmative action. The Personnel Assistant may conduct surveys and update manual and automated personnel records. At the higher levels, assistants perform limited aspects of personnel professionals' work such as interviewing candidates, recommending placements, performing compensation or benefit support activities involving contacts throughout the company, and preparing communications to various third party benefit vendors. Excluded are workers who primarily compute and process payrolls.

#### **01261 PERSONNEL ASSISTANT I**

This position performs a variety of tasks including, but not limited to, clerical and secretarial duties. The work is under general supervision of higher-level personnel in preparation of various human resource tasks throughout compensation, benefits, staffing/employment, EEO procedures and policy administration. The Personnel Assistant I is expected to exercise discretion at all times; limited judgment may be necessary at times. This assistant may be required to operate general office equipment such as: typewriter, personal computer, copier, adding machine, and facsimile.

#### **01262 PERSONNEL ASSISTANT II**

This position serves as a clerical expert in independently processing the most complicated types of personnel actions, e.g., temporary employment, rehires, and dismissals. In this position, one may perform tasks beyond routine clerical such as: pre-employment drug screening and new hire orientation, responding to routine questions on policy and procedures, and/or provide reports on employee turnover or time and attendance. This assistant may be asked to evaluate and consolidate information from various sources under short deadlines, such as internal or external survey information, reporting on company employment statistics (retention, equal opportunity reporting, etc). The Personnel Assistant II may provide guidance to lower level Personnel Assistants. This level requires extensive knowledge of various office software packages. Guidance is provided as needed. Completed written work receives close technical review from higher-level personnel office employees. Work may be checked occasionally.

#### **01263 PERSONNEL ASSISTANT III**

This position performs work in support of human resource professionals that requires a good working knowledge of personnel procedures, guides, and precedents. Job tasks may include interviewing applicants, obtaining references, and recommending placement in a well-defined occupation. At this level, assistants typically have a range of personal contacts within and outside the organization, in addition to handling employee-sensitive material. Therefore, the Assistant must be tactful, discrete, and articulate. This Assistant may be involved in identifying potential issues and grievance procedures, in addition to documenting necessary information to avoid company threat. The Personnel Assistant III may make recommendations to human resource professionals on job classification, wage rates, and employee salaries. The use of computers may be relied on heavily for organizational and reporting purposes. Advanced experience with office software packages may be needed. This Assistant may perform some clerical work in addition to the above duties. Supervisor will review completed work against stated objectives.

**01270 PRODUCTION CONTROL CLERK**

This position compiles and records production data for industrial establishments to compare records and reports on volume of production, consumption of material, quality control, and other aspects of production. May perform any combination of the following duties: compile and record production data from customer orders, work tickets, product specifications, and individual worker production sheets following prescribed recording procedures and using different word processing techniques. This Clerk calculates such factors as types and quantities of items produced, materials used, amount of scrap, frequency of defects, and worker and department production rates, using a computer, calculator, and/or spreadsheets. Additional tasks include: writing production reports based on data compiled, tabulated and computed, following prescribed formats, maintaining files of documents used and prepared, compiling detailed production sheets or work tickets for use by production workers as guides in assembly or manufacture of products. This Clerk prepares written work schedules based on established guidelines and priorities, compiles material inventory records and prepares requisitions for procurement of materials and supplies charts production using chart, graph, or pegboard based on statistics compiled for reference by production and management personnel. This Clerk also sorts and distributes work tickets or material and may compute wages from employee time cards and post wage data on records used for preparation of payroll.

**01280 RECEPTIONIST**

This position greets visitors, determining nature of visits and directing visitors to appropriate persons. The Receptionist may also have other duties such as recording and transmitting messages; keeping records of calls placed; providing information to callers and visitors; making appointments; keeping a log of visitors; and issuing visitor passes. In this position, one may also work on a computer and perform other routine clerical work that may occupy the major portion of the worker's time.

**01290 RENTAL CLERK**

This position performs clerical duties concerned with rental and management of public housing projects answers telephone and responds to requests for maintenance, complaints, rental information or, as appropriate, forwards calls to senior officials. The Rental Clerk receives rental payments and other income, assesses late charges, applies cancellation stamp required by government housing agency, writes receipts, and prepares rental transmittal forms and collection logs for government accounting system. This Clerk receives security deposits and prepares tenant receipts, prepares bank deposits, maintains tenant files, and follows up on income re-certifications.

**01300 SCHEDULER, MAINTENANCE**

This position schedules vehicle repairs and lubrication for vehicle-maintenance, schedules vehicles for lubrication or repairs based on date of last lubrication and mileage traveled or urgency of repairs. The Maintenance Scheduler contacts garage to verify availability of facilities, notifies parking garage workers to deliver specified vehicles, and maintains a file of requests for services.

### **01310 SECRETARY\* (Occupational Base)**

This position provides principal secretarial support in an office, usually to one individual, and, in some cases, to the subordinate staff of that individual. The Secretary maintains a close and highly responsive relationship to the day-to-day activities of the supervisor and staff, works fairly independently receiving a minimum of detailed supervision and guidance, and performs various clerical and secretarial duties requiring knowledge of office routine and an understanding of the organization, programs, and procedures related to the work of the office. Computers may exist in the environment, requiring working knowledge of certain office software programs.

#### **Classification by Level**

Secretary jobs that meet the required characteristics are matched at one of three levels according to two factors: (a) level of the secretary's supervisor within the overall organizational structure, and (b) level of the secretary's responsibility. The table following the explanations of these factors indicates the level of the secretary for each combination of factors.

#### **Level of Secretary's Supervisor (LS)**

Secretaries should be matched with one of the three LS levels below that best describes the organization of the secretary's supervisor.

LS-1 Organizational structure is not complex and internal procedures and administrative controls are simple and informal; supervisor directs staff through face-to-face meetings.

LS-2 Organizational structure is complex and is divided into subordinate groups that usually differ from each other as to subject matter, function, etc. Supervisor usually directs staff through intermediate supervisors. Internal procedures and administrative controls are formal. An entire organization (e.g., division, subsidiary, or parent organization) may contain a variety of subordinate groups that meet the LS-2 definition. Therefore, it is not unusual for one LS-2 supervisor to report to another LS-2 supervisor.

The presence of subordinate supervisors does not by itself, mean LS-2 applies. For example, a clerical processing organization divided into several units, each performing very similar work, is placed in LS-1.

In smaller organizations or industries such as retail trades, with relatively few organizational levels, the supervisor may have an impact on the policies and major programs of the entire organization, and may deal with important outside contacts as described in LS-3.

LS-3 Organizational structure is divided into two or more subordinate supervisory levels (of which at least one is a managerial level) with several subdivisions at each level. Executive's program(s) are usually interlocked on a direct and continuing basis with other major organizational segments, requiring constant attention to extensive formal coordination, clearances, and procedural controls. Executive typically has: financial decision-making authority for assigned program(s); considerable impact on the entire organization's financial position or image; and responsibility for, or has staff specialists in such areas as, personnel and administration for assigned organization. Executive plays an important role in determining the policies and major programs of the entire organization, and spends considerable time dealing with outside parties actively interested in assigned program(s) and current or controversial issues.

#### **Level of Secretary's Responsibility (LR)**

This factor evaluates the nature of the work relationship between the secretary and the supervisor or staff, and the extent to which the secretary is expected to exercise initiative and judgment. Secretaries should be matched at the level best describing their level of responsibility. When a position's duties span more than one LR level, the introductory paragraph at the beginning of each LR level should be used to determine which of the levels best matches the position. (Typically, secretaries performing at the higher levels of responsibility also perform duties described at the lower levels.)

- LR-1 Carries out recurring office procedures independently, and selects the guideline or reference that fits the specific case. The supervisor provides specific instructions on new assignments and checks completed work for accuracy. The LR-1 performs varied duties including or comparable to the following:
  - a. Respond to routine telephone requests that have standard answers; refer calls and visitors to appropriate staff. Control mail and assure timely staff response, and send form letters;
  - b. As instructed, maintain supervisor's calendar, make appointments, and arrange for meeting rooms:
  - c. Review materials prepared for supervisor's approval for typographical accuracy and proper format;
  - d. Maintain recurring internal reports, such as time and leave records, office equipment listings, correspondence controls, and training plans;
  - e. Requisition supplies, printing, maintenance or other services, type, take and transcribe dictation, create and maintain office files.

LR-2 handles differing situations, problems, and deviations in the work of the office according to the supervisor's general instructions, priorities, duties, policies, and program goals. Supervisor may assist secretary with special assignments. Duties include or are comparable to the following:

- a. Screen telephone calls, visitors, and incoming correspondence; personally respond to requests for information concerning office procedures; determine which requests should be handled by the supervisor, appropriate staff member or other offices, prepare and sign routine non-technical correspondence in own or supervisor's name;
- b. Schedule tentative appointments without prior clearance. Make arrangements for conferences and meetings and assemble established background materials as directed. May attend meetings and record and report on the proceedings;
- c. Review outgoing materials and correspondence for internal consistency and conformance with supervisor's procedures; assure that proper clearances have been obtained, when needed;
- d. Collect information from the files or staff for routine inquiries on office program(s) or periodic reports, and refer non-routine requests to supervisor or staff;
- e. Explain to subordinate staff supervisor's requirements concerning office procedures, coordinate personnel and administrative forms for the office and forwards for processing.

LR-3 uses greater judgment and initiative to determine the approach or action to take in non-routine

situations, interprets and adapts guidelines, including unwritten policies, precedents, and practices, which are not always completely applicable to changing situations. Duties include or are comparable to the following:

- a. Based on knowledge of the supervisor's views, compose correspondence on own initiative about administrative matters and general office policies for supervisor's approval;
- b. Anticipate and prepare materials needed by the supervisor for conferences, correspondence, appointments, meetings, telephone calls, etc., and informs supervisor on matters to be considered;
- c. Read publications, regulations, and directives and take action or refer those that are important to the supervisor and staff;
- d. Prepare special or one-time reports, summaries, or replies to inquiries, selecting relevant information from a variety of sources such as reports, documents, correspondence, other offices, etc., under general directions;
- e. Advise secretaries in subordinate offices on new procedures; request information needed from the subordinate office(s) for periodic or special conferences, reports, inquiries, etc., and shifts clerical staff to accommodate workload needs.

***Excludes secretaries performing any of the following duties:***

Acting as office manager for the executive's organization, e.g., determines when new procedures are needed for changing situations and devises and implements alternatives; revising or clarifying procedures to eliminate conflict or duplication; identifying and resolving various problems that affect the orderly flow of work in transactions with parties outside the organization.

Preparing agenda for conferences; explain discussion topics to participants; drafts introductions and develops background information and prepares outlines for executive or staff member(s) to use in writing speeches.

The LR-3 advises individuals outside the organization on the executive's views on major policies or current issues facing the organization; contacts or responds to contact from high-ranking outside officials (e.g., city or state officials, members of congress, presidents of national unions or large national or international firms, etc.) in unique situations. These officials may be relatively inaccessible, and each contact typically must be handled differently, using judgment and discretion.

## CRITERIA FOR MATCHING SECRETARIES BY LEVEL

Secretary I (01311), Secretary II (01312), Secretary III (01313),

Intentionally blank	LR-1	LR-2	LR-3	
LS-1	I 01311	II 01312	III 01313	
LS-2	I 01311	III 01313	See Note	
LS-3	I 01311	See Note	See Note	

**NOTE:** Employees whose duties meet this level of responsibility and supervision may be properly classified under the Administrative Assistant category or the class may need to be conformed.

### 01320 SERVICE ORDER DISPATCHER

This position receives, records, and distributes work orders to service crews upon customers' requests for service on articles or utilities purchased from wholesale or retail establishment or utility company, records information, such as name, address, article to be repaired, or service to be rendered, prepares work order and distributes to service crew, schedules service calls and dispatches service crew. The Service Order Dispatcher calls or writes the customer to insure satisfactory performance of service, keeps record of service calls and work orders, may dispatch orders and relay messages and special instructions to mobile crews and other departments using radio or cellular telephone equipment.

### 01410 SUPPLY TECHNICIAN

This position performs limited aspects of technical supply management work (e.g., inventory management, storage management, cataloging, and property utilization) related to depot, local, or other supply activities. Work usually is segregated by commodity area or function, and controlled in terms of difficulty, complexity, or responsibility. Assignments usually relate to stable or standardized segments of technical supply management operations; or to functions or subjects that are narrow in scope or limited in difficulty. The work generally involves individual case problems or supply actions. This work may require consideration of program requirements together with specific variations in or from standardized guidelines. Assignments require:

(a) a good working knowledge of the governing supply systems, programs, policies, nomenclature, work methods, manuals, or other established guidelines; (b) an understanding of the needs of the organization serviced; and (c) analytical ability to define or recognize the dimension of the problems involved, to collect the necessary data to establish the facts, and take or recommend action based upon application or interpretation of established guidelines.

### 01530 TRAVEL CLERK (Occupational Base)

This position plans itinerary and schedules travel accommodations for military and civilian personnel with dependents according to travel orders using knowledge of routes, types of carriers, and travel regulations. This Clerk verifies travel orders to insure costs, availability, and convenience of different types of carriers to select most advantageous route and carrier; notifies personnel of travel dates, baggage, limits and medical and visa requirements, and determines that all clearances have been obtained. The Travel Clerk assists personnel in completing travel forms and other business transactions pertaining to travel, may deliver personnel files and travel orders to persons prior to departure, meet and inform arriving personnel of available facilities and housing and furnish other information, and may arrange for motor transportation for arriving or departing personnel.

### **01531 TRAVEL CLERK I**

Under close supervision or following specific procedures and detailed instructions, The Travel Clerk I arranges travel on one or two modes of transportation. Travel is usually recurrent by the same modes, carriers, routes and same major points of origin and destination, seldom involving special transportation privileges or requiring special allowances or planning for supplemental transportation facilities. When such services are required, they do not occur in such variety or with such frequency as to create problems of timing or coordination.

### **01532 TRAVEL CLERK II**

Travel usually involves the use of two or more modes of transportation. Information on carriers, modes and facilities is readily available since most carriers servicing the area maintain local facilities or publish information regularly. Single carriers or connecting carriers have schedules that are easily coordinated using readily obtainable timetables or guides.

Travel is frequently recurrent. A substantial number of problems arise because of rerouting, and there are often side trips requiring changes of transportation. Travel is usually to areas accessible by direct line, or established connecting points and normal modes of transportation. Travel is not always planned well in advance so there may be major problems of scheduling or accommodations.

Travel involves special transportation privileges or special allowances and requires authorization or planning for supplemental or special transportation facilities, and when such services are required, they usually do not occur in such variety or with such frequency as to create major problems of timing or coordination.

Within general guidelines, employees select and apply appropriate travel guides, methods, techniques, and work sequences to effectively accomplish the work. The majority of assignments are performed without technical assistance, but unusually difficult travel situations or problem cases encountered during the course of the work are referred to the supervisor before decision or commitment. Review of work is for compliance with regulatory guides and program policies and for soundness of decisions and conclusions.

### **01533 TRAVEL CLERK III**

At this level, all major modes of transportation are used, as most individual trips involve combinations of more than one mode. Travel is varied, often not recurrent and periodically requires planning for relatively inaccessible intermediate or destination points. Routings are diverse and there is a necessity for frequent rerouting, re-planning, or rearranging, with many side trips requiring changes in modes of travel and creating substantial difficulty in routing and scheduling connections.

A substantial amount of travel involves special allowances or requires authorization and planning for supplementary or special transportation facilities. It is frequently difficult to obtain the required information.

The incumbent is characterized by independence of action, with very little instruction, guidance, and review, except for review of accomplishments of broad objectives and conformance to policy. The incumbent is viewed as the authority on travel matters, including the furnishing of advice and information to travelers, administrative officials and others; and has responsibility as the principal liaison with all elements, carriers, and facilities.



#### **01610 WORD PROCESSOR (Occupational Base)**

This position uses automated systems, such as word processing equipment, personal computers, or work stations linked to a larger computer or local area network, to produce a variety of documents, such as correspondence, memos, publications, forms, reports, tables and graphs. The Word Processor uses one or more word processing software packages; may also perform routine clerical tasks, such as operating copiers, filing, answering telephones, and sorting and distributing mail.

##### **Excluded are:**

- a. Typists using automatic or manual typewriters with limited or no text-editing capabilities; workers in these positions are not typically required to use word processing software packages;
- b. Key Entry Operators, Accounting Clerks, Sales Clerks, and other clerks who may use automated word processing equipment for purposes other than typing composition;
- c. Positions requiring subject-matter knowledge to prepare and edit text using automated word processing equipment.

#### **01611 WORD PROCESSOR I**

This position produces a variety of standard documents, such as correspondence, form letters, reports, tables and other printed materials. Work requires skill in typing; a knowledge of grammar, punctuation and spelling; and ability to use reference guides and equipment manuals. The Word Processor I performs familiar, routine assignments following standard procedures, seeks further instructions for assignments requiring deviations from established procedures.

#### **01612 WORD PROCESSOR II**

This position uses knowledge of varied and advanced functions of one software type, knowledge of varied functions of different types of software, or knowledge of specialized or technical terminology to perform such typical duties as:

- a. Editing and reformatting written or electronic drafts. Examples include: correcting function codes; adjusting spacing formatting and standardizing headings, margins, and indentations.
- b. Transcribing scientific reports, lab analysis, legal proceedings, or similar material from voice tapes or handwritten drafts. Work requires knowledge of specialized, technical, or scientific terminology.

Work requires familiarity with office terminology and practices. Incumbent corrects copy, and questions originator of document concerning missing information, improper formatting, or discrepancies in instructions. Supervisor sets priorities and deadlines on continuing assignments, furnishes general instructions for recurring work and provides specific instructions for new or unique projects.

#### **01613 WORD PROCESSOR III**

Requires both a comprehensive knowledge of word processing software applications and office practices and a high degree of skill in applying software functions to prepare complex and detailed documents. For example, processes complex and lengthy technical reports which include tables, graphs, charts, or multiple columns. Uses either different word processing packages or many different style macros or special command functions; independently completes assignments and resolves problems.